

Confirmation Number:

Program Title: ***Statewide Home Energy Efficiency Surveys Program***

Proposed by:

**Southern California Edison**

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List of all other public goods charge programs proposed:

1. Statewide Residential Appliance Recycling
2. Statewide Single Family Energy Efficiency Rebates
3. Statewide Multifamily Energy Efficiency Rebates
- 4. Statewide Home Energy Efficiency Surveys**
5. Statewide CA Energy Star New Homes – Single Family, Multifamily programs
6. Statewide Standard Performance Contract
7. Statewide Express Efficiency
8. Statewide Nonresidential Energy Audits
9. Statewide Building Operator Certification
10. Statewide Emerging Technologies
11. Savings By Design
12. Statewide Education and Training
13. Statewide Codes and Standards Advocacy
14. Local Small Nonresidential Hard to Reach
15. Local Pump Test and Hydraulic Services
16. Local Community Partnerships – Local Government Initiatives
17. Local Community Partnership – 12 Cities
18. Local Community Partnership - Ventura County
19. Local Community Partnership - South Bay Cities Council of Governments
20. Local Los Angeles County program
21. Local UC/CSU program
22. Local City of Pomona program

# **Southern California Edison 2004-05 Energy Efficiency Program Plan**

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# Southern California Edison 2004-05 Energy Efficiency Program Plan

## Statewide Home Energy Efficiency Surveys Program

### I. Program Overview

#### A. Program Concept

The Statewide Home Energy Efficiency Survey (HEES) program provides a comprehensive multi-lingual approach, which is specifically designed to reach a wide range of customers by offering three types of survey options: Mail-In, On-Line, and In-Home. The program provides practical information that customers can immediately apply to reduce better understand energy use in their homes to achieve cost savings and to empower them to make educated decisions related to energy efficiency products and equipment upgrades. Many customer behavior studies have consistently demonstrated that such a knowledge empowerment leads to actual behavioral changes contributing to the ultimate goal of adoption of energy efficiency practices and measures. This multifaceted approach recognizes that customers have distinct needs that may make one type of delivery channel more appealing than another. The goal of offering and marketing energy surveys through different channels is to ensure customer equity by provide the opportunity for an energy survey to any utility customer who might benefit. As a result, the program is positioned to reach the largest number of customers possible by providing more options for customer participation, including hard-to-reach (HTR) customers who in the past have had less access and fewer program alternatives. All delivery channels help customers understand how their behavior can affect energy costs and what they can do to improve their homes' energy efficiency through available and what additional resources and programs and services are available to help reduce energy use. In this support and complementary role to other residential programs and services, the HEES program becomes an integral part of the residential energy efficiency portfolio as evidenced by data presented in this plan.

#### B. Program Rationale

The HEES program is an extension of an existing successful energy efficiency information program. HEES is one of the primary tools used to effectively communicate in multiple languages the importance of energy efficiency and available rebate and incentive programs to California's diverse society. The program increases consumer awareness about the benefits of energy efficiency and encourages the adoption of energy efficiency measures based on the customer's energy usage. Research on customer behavior regarding energy efficiency clearly indicates that there is a direct link between educational and information programs leading to changes in customer behavior and the subsequent adoption of hardware energy efficiency measures.

#### *2002 HEES Accomplishments*

During the 2002 program year, over 52,000 customers completed the Mail-In Survey and over 21,000 customers completed the On-Line Survey in all four investor-owned utilities (IOU) service areas. **The EM&V results for the 2002**

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HEES and the In-Home Energy Surveys indicate that 74% of program participants implemented at least one recommendation AFTER the survey date<sup>1</sup>. About 4 in every 10 customers participating in the Mail-In and On-Line Surveys adopted and implemented energy efficiency measures suggested in the personalized energy reports<sup>2</sup>.

Based on the Evaluation of 2002 Statewide HEES and SCE's In-Home Survey programs, survey-specific percentages of participants adopting at least one measure or practice are listed below.<sup>3</sup>

<u>Survey Type</u>	<u>Number of Recommendations Adopted</u>	<u>% of Participants adopting at least one recommendation</u>
<u>On-Line</u>	<u>2.64</u>	<u>82%</u>
<u>Mail-In</u>	<u>2.33</u>	<u>78%</u>
<u>In-Home</u>	<u>2.89</u>	<u>67%</u>
<u>Overall</u>	<u>2.61</u>	<u>74%</u>

### 2003 HEES Accomplishments

Reported thus far for the 2003 program year, about 84,000 customers completed the Mail-In Survey and about 32,500 customers completed the On-Line Survey in all four IOU service areas. Customer demand increased 60% from 2002.

### Reaching Customers In-Language

In the 2003 program year, SCE and PG&E mailed more than 350,000 English, 38,000 Spanish and 38,000 Chinese Mail-In Surveys to increase consumer awareness about the benefits of energy efficiency. With a high response rate ranging from 8%-19% among the IOUs, the HEES program continues to be popular with customers who can access energy efficiency information through the three survey options and different languages. SCE experienced a remarkable 14% response rate for its mailing of 25,000 Chinese Mail-In Surveys in 2002. For 2003, SCE successfully achieved thus far a 14% response rate for English, 3% for Spanish, and 9% for Chinese Mail-In Surveys.

### 2002 and 2003 On-Line Survey Accomplishments

In the 2002 and 2003 program years, about 54,000 customers completed the IOU's On-Line Survey and received instant access to energy efficiency information. Customer demand increased 154% from 2002. SCE's successful Blockbuster and Starbucks campaigns, which included Spanish e-mail blasts and on-line banners on

<sup>1</sup> Evaluation of the California 2002 Home Energy Efficiency Survey Program, Ridge & Associates, 3022 Thompson Ave, Alameda, CA 94501, In association with KVD Research and Quantum Consulting

<sup>2</sup> Interim Reports for PY2002 Home Energy Efficiency Survey Program, Rick Ridge & Associates, November 28, 2003

<sup>3</sup> Evaluation of Southern California Edison's Residential Audit Programs: Final Report, Ridge & Associates, September 6, 2002

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Univision's regional website, resulted in more than 90% of completed surveys in 2003.

### Customer Equity

The HEES program offers delivery channels that reflect the belief that customers vary in what they perceive as credible or find convenient when seeking to assess and reduce their energy use at home. Adding an In-Home Survey component to HEES will expand opportunities for customers. The results from the evaluation of SCE's In-Home Survey program in 2002 indicated that the program has clearly demonstrated its value to customers in terms of high levels of satisfaction both with the survey as well as the energy auditor. Over 90% of the respondents agree the survey recommendations are relevant and informative. SCE completed more than 10,000 English and Spanish In-Home Surveys in 2002 and 2003. The program has exceeded its HTR targets of 50% each year with 71% in 2002 and 85% reported thus far for 2003.

Maintaining the In-Home Survey option is particularly important in 2004-2005, with customers continuing to face higher rates than they did two years ago and continued exposure to mass media campaigns and press coverage about the need for and general possibilities for achieving significant energy savings.

The HEES program has sought to achieve equity through translating the survey into multiple languages. The Mail-In survey includes targeted direct mailings in English and Spanish in all IOU service areas; in Chinese in Pacific Gas and Electric Company (PG&E), Southern California Gas Company (SCG), and Southern California Edison Company (SCE) service areas; and in Vietnamese in San Diego Gas and Electric Company (SDG&E) service area.

With the translation of the Mail-In and On-Line Surveys into two additional Asian languages in 2004 –2005, the SFEER, SRAR and HEES programs are expected to continue stimulating customer demand for energy efficiency. ~~will reach even more customers for whom language has been the market barrier preventing their participation.~~

~~The results from the evaluation of SCE's residential In Home survey program in 2002 indicated that the program has clearly demonstrated its value to customers in terms of high levels of satisfaction both with the survey as well as the auditor. Maintaining this option is particularly important in 2004-2005, with customers continuing to face higher rates than they did two years ago and continued exposure to mass media campaigns and press coverage about the need for and general possibilities for achieving significant energy savings.~~

As experienced program administrators, the IOUs have successfully accomplished many program goals in past years. The accomplishments listed below demonstrate that the HEES program is a successful information program and should continue:

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### Statewide HEES program accomplishments in 2002-2003:

- In 2002, the IOUs jointly designed a statewide English language version of the Mail-In survey.
- In 2002, each IOU posted the Spanish and one Asian language version of the Mail-In Survey on their websites.
- The IOUs held several statewide conference calls in 2002-2003 to coordinate program delivery and implemented the new statewide pricing structure for Mail-In Surveys. The IOUs also developed a statewide mailing schedule and standard statewide reporting requirements to improve program delivery.
- The IOUs launched a new Spanish interactive On-Line Survey in 2003.

### SCE's HEES program accomplishments in 2002-2003:

- Increased customer demand for the program by exceeding 2002 and 2003 completed surveys and HTR targets.
- ~~Launched a~~ Accomplished the completed survey goals in 2002. The 2003 goals are on track to be accomplished by end of 2003;
- Blockbuster movie rental campaign to increase customer participation in the English On-Line Survey in 2002. The campaign provided a free movie rental to customers for completing the On-Line Survey and included e-mail blasts and banner ads on local and regional websites;
- ~~Completed more than 400 Mail-In Spanish surveys and 1,500 Mail-In Chinese surveys in 2003;~~
- Launched a Starbucks campaign to increase customer participation in the English and Spanish On-Line Surveys in 2003. The campaign provided customers with a complimentary \$5 Starbucks card for completing the On-Line Survey and included English and Spanish e-mail blasts and online banner ads on local and regional websites.
- Developed a English and Spanish "fast track" On-Line Survey to provide customers with personalized energy recommendations within 5 minutes.
- Developed and implemented a pilot program to increase HTR customer participation from Spanish and Asian communities by working with CBOs.
- ~~Successfully launched the new On-Line Spanish interactive survey along with innovative marketing approaches such as e-mail blasts in English and Spanish, on-line banner ads, and \$5 Starbucks Card to increase participation, that provide immediate feedbacks on lowering customers' energy use; and~~
- ~~Accomplished the 2002 and 2003 hard to reach goals.~~

Changes from the 2003 program include expanding equity by increasing customer participation and accessibility in new customer groups through the inclusion of surveys in two additional Asian languages, Vietnamese and Korean in PG&E's, SoCalGas', and SCE's service areas, and Chinese and Korean versions in SDG&E's service area.

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The IOUs will update the survey questions and energy recommendations for the HEES program. Plans are also underway to update the questions and energy recommendations for the Mail-In survey in 2004. The IOUs will modify the existing survey instruments so that it reflects the changes in state and federal standards and addition of new available rebates and incentives. This revised survey will include energy calculations for new heating and cooling equipment and pool efficiency equipment available for rebates in the SFEER program. have the original statewide format and design and questions and recommendations with the following information updated:

New energy efficiency equipment (two speed pool pump, advanced whole house evaporative cooler, whole house fan);

New energy efficiency technologies (TXV valve, advanced programmable thermostat, LED Lighting);

Energy saving calculation; and

Energy saving recommendations.

### C. Program Objectives

The infrastructure set up for this program makes it possible to achieve the major goals for this program, providing valuable information that helps customers to:

- Save energy and money.
- Make informed purchase decisions through survey information about energy efficiency technologies, e.g., appliance, equipment and lighting products.
- Determine which appliances or equipment are consuming the most energy so that they can reduce their energy costs.
- ~~Make their homes more comfortable; and~~
- Learn about Discover additional resources and programs available to help reduce energy use.
- The program also has potential to achieve energy savings and reduce demand as documented in the past EM&V studies.

The 2002 EM&V study surveys conducted with customers clearly demonstrate that customers often want to know which of their appliances and other end uses are the biggest consumer of electricity so they can prioritize their purchases of energy efficient products. The HEES program provides customers with customer-specific valuable information at no charge, to assist them with understanding, controlling and reducing energy use in their homes and making wise purchase decisions for energy efficient products. The IOUs will continue to expand efforts to include HTR customers who have yet to take advantage of the many IOU programs and energy efficiency services.

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Although the HEES program is an information program, past EM&V studies have demonstrated that energy surveys lead to the potential energy savings resulting from the actions customers take after receiving an energy survey. One recent EM&V study from September 2002 conducted by Ridge and Associates has estimated the following gross and net kWh and kW impacts per dwelling/energy survey:

### Southern California Edison Specific:

Survey Type	Gross first-year kWh savings per dwelling	Gross first-year kW reductions per dwelling	Net first-year kWh reductions per dwelling	Net first-year kW reductions per dwelling
On-Line	171.4	0.082	123.4	0.059
Mail-In	171.4	0.082	123.4	0.059
In-Home	611.7	0.132	440.4	0.095
Phone	257.2	0.055	185.2	0.040

Additionally, the study also concluded that energy and demand savings from energy surveys last beyond the expected two years and that the effective useful life across all adopted measures and practices as a result of the Mail-in, On-Line and In-Home Survey be at least doubled. The expected energy savings for 2004 based upon these assumptions would be approximately 5,556,283 annual kWh.

IOUs will continue to focus on improving the current program by increasing customer accessibility to the survey through minimizing market barriers to participation, ensuring customer equity, providing innovative approaches to program participation, and by coordinating with other existing programs to maximize program efficiency.

#### 1) Market Barriers

The HEES program clearly addresses a lack of customer information about energy efficiency benefits by providing three comprehensive no cost energy surveys, which unlike other services or products, require customer participation and ownership for energy usage and behavioral patterns. Without the HEES program, customers would be forced to search out information through a variety of vendors and service providers, who may be limited to providing information on one product or service.

The HEES program also helps overcome the barrier of customers not willing to make energy efficiency investments by providing “no cost” and “low cost” energy saving recommendations to customers. A detail report with personalized energy analysis and recommendations is sent to each customer



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who completes the Mail-In and On-Line Surveys, and customers can call the survey processing center whenever they have any questions on the report.

Under the HEES program, customers receive objective information on a multitude of energy products, energy services and available rebate and incentive programs. By coordinating with other program implementers to present information and energy saving recommendations that would encourage participation in the incentive programs, the HEES program is able to overcome this market barrier and increase consumer awareness of the benefits of energy efficiency and participate in programs and services.~~the market barriers of customer lack of knowledge about energy efficiency and lack of customer participation in the rebate programs.~~

With the constantly changing and advancing society that we are living in, energy efficiency information should be constantly updated to reflect these changes in technology, product updates, local and state code and standards, etc. Therefore, the IOUs will update the information provided to customers in the questions and answers in the HEES program to reflect these changes. Not only can customers benefit from the accurate information the HEES program provides, but also they will be more likely to implement the energy savings recommendations when the HEES information is refreshed, technologically accurate, and reflects current practices. In addition, the updated information will help overcome a few of the market barriers, which includes but not limited to: customers' lack of interest on the HEES program, lack of motivation to choose energy efficient products, and the availability of information at the time customers are making a purchase decision. ~~Plans are underway to update the questions and answers on the Mail-In survey in 2003 to overcome this common market barrier that a lot of programs encounter. Not only can customers benefit from the accurate information the HEES program provides, but also customers will be more likely to implement the energy savings recommendations when the HEES information is refreshed, technologically accurate, and reflects real world activities.~~

### 2) Customer Equity

The HEES program is one of the primary tools used to effectively communicate energy efficiency information in multiple languages and available rebate and incentive programs to California's diverse society. The HEES program focuses on equity, recognizes the vast diversity in the State, and serves as a tool to bring energy efficiency programs to all customer groups.

The program addresses customer equity by: 1) offering three survey choices, Mail-In, On-Line, or In-Home, thus increasing the likelihood of participation; and 2) providing survey options in different languages (English, Spanish, Chinese, Vietnamese), thus making the service available to those customers who typically have less access to energy efficiency information due to a language barrier. The Mail-In Survey is currently available in English and

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Spanish in all four IOU service areas, in Chinese in PG&E's, SCE's, and SoCalGas's service areas, and in Vietnamese in SDG&E's service area.

With the translation of the HEES into two additional Asian languages planned in 2004 –2005, the program will continue to address language as a barrier from preventing customer participation. reach even more customers for whom language has been the market barrier preventing their participation. The equity goals for hard to reach participants in 2004 and 2005 will be 50 percent of all participants, which will ensure the HEES program continues to achieve equity in its survey offerings by reaching out to target markets throughout the service areas.

### 3) Innovation

The HEES program incorporates innovative ideas, delivery mechanisms and new providers of energy efficiency services to increase customer participation, overcome existing shortcomings and improve the effectiveness of existing programs.

With the introduction of interactive on-line services, personalized energy efficiency information is available through On-Line Surveys, which has been enhanced to provide customer-specific results within five minutes. The “fast track” On-Line Survey is a shorter version of the comprehensive On-Line Survey and is also available in English and Spanish.

With the introduction of interactive on line services, the HEES program has kept up with the customer trend towards increased access to and use of the Internet. The On-Line survey, which is available in English and Spanish, satisfies customer demands for more information, quicker, and provides IOUs with an easy venue for presenting new ideas, new delivery mechanisms, and updated information on rebates, products and services. Innovation is key in the HEES ability to offer surveys that meet customers' needs. The IOUs will continue to explore on-line marketing approaches, such as e-mail blasts, banner ads, and promotions to increase customer participation in survey, rebate and incentive programs. Online marketing approaches include other languages and coordination with the Statewide Marketing and Outreach programs.

In 2002, Spanish and one Asian language were added to the English only HEES Mail-In survey list. In 2003, the Spanish survey was upgraded from a downloadable pdf file format to an On-Line Interactive survey that provides instant survey results to customers. In 2004 and 2005, the HEES program will again increase the program's diversity by adding two Asian languages in order to reach more non-English speaking HTR customers. IOUs will explore opportunities to use community-based organizations (CBOs) and faith-based organizations (FBOs) as new delivery mechanisms to promote the In-Home Survey and assist customers in completing the Mail-In and On-Line Surveys. The 2004 and 2005 programs may also include e-mail blasts to customers. The

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e-mail blasts may also include direct links to rebate and incentive information available on the Internet, with direct links to rebates and on-line rebate applications; and 2) to develop effective linkages with rebate program, including data mining customer survey data to automatically target customers for rebates.

#### 4) Coordination with other programs implementers

The HEES program will continue to work closely with other existing statewide programs, state agencies, private entities, municipal utilities and the federal government to maximize program efficiency. The program incorporates cross-marketing of rebates and incentives available through the SFEER and SRAR programs by recommending replacement or removal of old, inefficient appliances and equipment. HEES supports the Statewide Marketing and Outreach Program and the State's Flex Your Power campaign by providing energy efficiency information in multiple languages and promoting the same energy efficient technologies.

~~The program's current design incorporates cross marketing of other information, service and rebate programs to include statewide marketing and outreach programs.~~

HEES will continue to expand synergies created with programs run by private entities. In 2003, the IOUs partnered with community-based organizations (CBOs) to target Spanish and Asian communities. SCE's pilot program resulted in a total of 1,550 surveys completed through participating Spanish and Asian CBOs. In 2004, the IOUs will expand coordination efforts to include faith-based organizations as potential new service provider of energy surveys through the IOU community partnership programs.

In 2003, the IOUs will expand coordination efforts by working with the Los Angeles Department of Water and Power, Sacramento Municipal Utility District, The Metropolitan Water District and other utilities so that customers participating in the HEES program are aware of other available energy efficiency resources. New for 2004-2005, SCE will expand its existing In-Home Survey and combine efforts with SoCalGas to conducted surveys for customers on both electric and gas usage.

HEES also supports the federal government's ENERGY STAR® program by promoting ENERGY STAR® qualified appliances, lighting and heating and cooling equipment to help customers reduce energy costs. The HEES program includes links to the ENERGY STAR® website which includes a list of qualifying ENERGY STAR® qualified products and a store locator to purchase products.

Because of its comprehensive approach, the HEES program can effectively target customers while communicating and cross-selling other energy efficiency programs and services. ~~All three surveys will be coordinated with the other residential energy efficiency programs offer by IOUs. Customized~~

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~~messages on energy efficiency programs, rebates, promotional Web page, and links will be added to specific energy savings recommendations in the Mail-In and On-Line surveys. Once customers complete the surveys, reports back to customers include information on the customers' home energy use, available energy efficiency products, services and information on rebate programs offered by IOUs. Customers seeking additional information are directed to IOU's Website. The energy savings recommendations motivate customers with a customized message that tells them how to implement the recommendations and what type of assistance the utility provides to help them implement the recommendations.~~

~~New for 2004-2005, SCE will expand its existing In-Home survey and combine efforts with SoCalGas to conduct a survey for both electric and gas usage.~~

### 5) Quality and Viability of Program Design

The quality and viability of the HEES program design is a proven product providing customers with a wealth of energy-saving tips and the latest information on energy efficient equipment and appliances. The program provides a comprehensive multi-lingual approach, which is specifically designed to reach a wide range of customers by offering three types of energy survey options: Mail-In, On-Line, and In-Home.

The program provides practical information that customers can immediately apply to reduce energy usage in their homes and to empower them to make educated purchase decisions for energy efficient products. This multifaceted approach recognizes that customers have distinct needs that may make one type of delivery channel more appealing than another. All delivery channels help customers understand how their behavior can affect home energy costs and what they can do to improve their homes' energy efficiency through available programs and services.

The Mail-In and On-Line Surveys provide energy analysis reports containing customer-specific results of energy usage and costs, including helpful charts and graphs. Immediate access to customer-specific results is offered through the On-Line Survey available on the IOUs website. The In-Home Survey educates customers on ways to reduce their energy bill through on-site visits by a trained energy auditor.

## **II. Program Process**

### **A. Program Implementation**

The Mail-In Survey is distributed to customers via direct mail marketing efforts, as handouts through In-Home visits and public events, and through customer requests. Participating customers are given a survey and materials explaining the value of the program. Once completed, the survey is mailed back to the statewide

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Mail-In Survey vendor for processing. Completed surveys are analyzed against the customer's actual energy usage, and a report representing actual energy usage in graph form is mailed to the customer. Reports include information on energy efficiency products and services, rebate programs, and other energy-related information to encourage adoption of energy efficiency measures identified through the energy survey. On-Line Survey provides customers easy access via IOUs' websites. The interactive feature allows customers to obtain immediate results by answering specific questions regarding their home energy use on-line. This On-Line Survey only takes few minutes to complete, and provides an analysis of energy use in their home as well as energy-saving recommendations. The In-Home Survey program will provide customers an on-site energy survey by a trained energy auditor.

Each IOU may provide different promotions to residential customers who completed the On-Line Survey to increase customers' response rate to solicitation materials. In addition, IOUs will increase program visibility and accessibility through leveraging of existing rebate programs with marketing partnerships. Details on any pilot marketing promotions will be report in each IOU's quarterly reports to the Commission.

### B. Marketing Plan

The program will incorporate a variety of marketing approaches to promote its availability and increase outreach. Because utility service areas and customer segments are unique, marketing efforts may be tailored by each utility to obtain maximum effectiveness and the highest response rate. Where practical, IOUs will jointly launch marketing efforts, and will explore opportunities to coordinate with community-based-organizations (CBOs) and faith-based organizations (FBOs) in outreach and to directly deliver program services to traditionally HTR areas. These CBOs and FBOs may include churches, community centers, adult schools and senior centers. Similarly, IOUs will continue to coordinate closely with the Statewide Marketing and Outreach Campaign.

The following provides an estimate of the types and cost of various marketing efforts that may occur in 2004-2005:

### **Southern California Edison Marketing Materials for each of the two years in 2004 and 2005:**

<u>Description of Marketing Materials</u>	<u>Quantity</u>	<u>Method of Distribution</u>	<u>Projected Material Cost</u>
<u>Printing and Mailing of Mail-In Survey/solicitation packages (Multi-lingual)</u>	<u>300,000</u>	<u>Direct Mail, CBOs, FBOs</u>	<u>\$320,000</u>

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<u>Printing and Mailing of In-Home Survey/solicitation packages (Multi-lingual)</u>	<u>125,000</u>	<u>Direct Mail, CBOs, FBOs</u>	<u>\$120,000</u>
<u>In-Home Survey Promotions</u>	<u>10,000</u>	<u>Energy survey auditors, CBOs, FBOs</u>	<u>\$30,000</u>
<u>On-Line Survey Flyers (Multi-lingual)</u>	<u>50,000</u>	<u>Mobile Education Unit, Community events, CBOs, FBOs</u>	<u>\$10,000</u>
<u>On-Line Survey Bill Insert</u>	<u>3,900,000</u>	<u>Bill Insert</u>	<u>\$30,000</u>
<u>On-Line Survey E-mail Blasts (English)</u>	<u>1,600,000</u>	<u>E-mail</u>	<u>\$90,000</u>
<u>On-Line Survey E-mail Blasts/Print Advertising (Multi-lingual)</u>	<u>250,000</u>	<u>E-mail/Print Advertising</u>	<u>\$25,000</u>
<u>On-Line Survey Fulfillment</u>	<u>14,000</u>	<u>Mail</u>	<u>\$11,000</u>
<u>Online Survey Promotions (i.e., gift cards)</u>	<u>14,000</u>	<u>On-Line / Mail</u>	<u>\$60,000</u>
<u>On-Line Survey Media</u>	<u>4,000,000</u>	<u>On-Line Media Impressions</u>	<u>\$25,000</u>
<u>Online Survey Utility Website (banners and placements)</u>	<u>2</u>	<u>Online Media</u>	<u>No Charge</u>
<u>Online Survey Misc. (web hosting, coding, database engineering etc.)</u>	<u>N/A</u>	<u>N/A</u>	<u>\$60,000</u>

With the addition of the In-Home Survey to the HEES, SCE will explore opportunities of adding the Chinese language to the 2004 In-Home Survey. The Census 2000 data shows that about a quarter of all California census tracts have Asian populations of more than 14% with the remainder being less than that. The Chinese-speaking customers are more difficult to reach through traditional outreach activities since many do not speak fluent English. Data shows that there is low level of literacy in English for Chinese, especially those who may have come from China or Vietnam. [4] Through a Chinese-speaking auditor, this segment will reap full benefit in achieving energy savings.

### C. Customer Enrollment

The following lists customer enrollment process in each program components:

#### Mail-In

Participating customers receive a survey either through direct mail, contacting their local utility, or by printing a hard copy of the On-Line Survey. Customers mail completed surveys to a statewide Mail-In Survey contractor for processing. Once received, surveys are analyzed against customer billing data to produce an energy

<sup>4</sup> Statewide Residential Needs Assessment Study, July 2002: [www.calmac.org](http://www.calmac.org); study ID 3533

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analysis report containing customer-specific results. Reports include: 1) an end-use breakdown of electricity, 2) monthly usage trend graph, and 3) a set of recommendations, with corresponding estimated savings that are appropriate for each customer based on their survey responses. Additionally, reports include information on energy efficiency products and services, rebate programs, and other energy-related information to encourage adoption of energy efficiency measures identified through the energy survey.

#### On-Line

On-Line Surveys provide customers easy access via the IOU's websites. The interactive feature allows customers to obtain immediate results by answering specific questions regarding their home energy use on line. This On-Line Survey only takes a few minutes to complete and provides an analysis of energy use in their homes as well as energy-saving recommendations. The On-Line Survey are available in both the short and extensive version. Promotions may be offered to increase customer participation.

#### In-Home

Participating customers in PG&E, SCE and SDG&E service areas may participate in this component by contacting their local utility. This approach provides customers, particularly HTR customers who do not respond to Internet and Mail-In Survey options, with a more personalized, face-to-face energy survey option. A specially trained energy auditor inspects the home and provides the customer with immediate answers to basic questions as well as specific recommendations on how customers can save energy and manage costs based on their homes and lifestyles. Promotions may be offered to increase customer participation.

#### **D. Materials**

Section II.D is not applicable.

#### **E. Payment of Incentives**

Section II.E is not applicable.

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### F. Staff and Subcontractor Responsibilities

#### 2004 and 2005 Utility Staff Responsibilities – Southern California Edison

Job Title	Utility Staff No.	Responsibilities	Estimate work hours per week
Manager	1	Supervise Team Managers and Program Managers	2
Team Manager	1	Supervise Program Managers and oversee residential energy efficiency programs	15
Program Manager	1	Coordinates and manages all activities for HEES program.	40

#### 2004 and 2005 Subcontractor – Xenergy, Inc., Statewide Mail-In Survey

**vendor:** mails energy surveys to customers as profiled by IOUs, process the returned surveys, analyze against customer billing data, produce and mail energy analysis reports to customers.

Job Title	Sub Contractor Staff No.	Responsibilities	Estimate work hours per week			
			PG&E	SCE	So. Cal. Gas	SDG&E
Sr. Project Manager	1	Coordinates and manages all activities on these programs and acts as liaison between utilities and Xenergy, Inc.	18	11	5	3
Technical Product Specialist	1	Oversees and maintains quality and production of analysis and report functions of software and related hardware functions	18	11	5	3



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Job Title	Sub Contractor Staff No.	Responsibilities	Estimate work hours per week			
			PG&E	SCE	So. Cal. Gas	SDG&E
Quality Control Engineers	2.5	Examines analysis output and quality control functions of residential energy consumption software as well as maintenance of measures, formatting of reports	45	27.5	12.5	7.5
Production Coordinator	1	Manages work of 5 production assistants overseeing all processes regarding processing paper surveys, mailing customer reports, filing and maintaining surveys and processing billing data	16	13	5	2
Data Specialist	1	Processes incoming billing data, provides reporting for monthly invoicing and for client requests, assists with problem accounts, maintains internal program record keeping	11	7	4	2
Production Assistants	5	Assists in processing all incoming surveys and mailing all outgoing reports. Assists with 800 line calls, and maintaining processed surveys, fulfilling client/customer requests for materials	90	55	25	15

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**2004 and 2005 Subcontractor – Xenergy, Inc., SCE On-Line Survey vendor:** in addition to the direct mail of energy surveys to customers, Xenergy and will develop the interactive surveys as directed by SCE.

Job Title	Sub Contractor Staff No.	Responsibilities	Estimate work hours per project
Project Manager	1	Coordinates all development activities	40 hours
Programmers	3	Initializes the database, creates new graphics, develops and installs the website, plus all testing	120 hours per person

**2004 and 2005 Subcontractor – Conservation Services Group, SCE In-Home and Phone Survey vendor:** schedules appointments and conducts field or telephone surveys, and processes the completed surveys.

Job Title	Sub Contractor Staff No.	Responsibilities	Estimate work hours per week
Project Coordinator & Customer Service Specialist	1	Performs field surveys, handles special bill complaints, supervises field staff, produces the invoices, and provides weekly tracking.	40
Office Supervisor	1	Answers the phones and schedules appointments and back-up fro data entry. Tracks incoming cards and appointments scheduled. Ensures schedules are filled.	40
Data Entry and Scheduler	2	Answers phones and schedules appointment and calls to confirm appointments	45
Field Auditor	3	Visits customers as scheduled and performs in-home energy surveys	120
Phone Auditor	1	Calls customers as scheduled and performs energy surveys over the phone.	20

### G. Work Plan and Timeline for Program Implementation 2004 and 2005 Activity Table

Statewide IOU Activity	Estimated Target Date*
Program launch	January 1, 2004
Update survey questions and energy report	June 30, 2004
Add two Asian language surveys	September 30, 2004

\*Dependent upon CPUC Approval.

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### III. Customer Description

#### A. Customer Description

The program targets residential customers in three distinct market segments:

1) Customers with frequent Internet access, at home and work; 2) Customers with limited on line access; 3) HTR customers with limited or no\_on\_line access who prefer a more personalized face to face In-Home Survey option; and 4) customers who request immediate energy solutions over the phone.

1) Customers with frequent Internet access, at home and work:

The On-Line Survey provides customers who frequently access the Internet with an interactive feature easily accessible on IOUs websites, which allows customers to obtain immediate results by answering specific questions regarding their home energy use on line. This On-Line Survey only takes few minutes to complete, and provides an analysis of energy use in their home as well as energy-saving recommendations.

2) Customers with limited on line access:

The written version of the survey is currently available in English and Spanish in all four IOU service areas, in Chinese in PG&E, SoCalGas, and SCE service areas, and in Vietnamese in SDG&E's service area. This Mail-In Survey version allows customers with limited or no\_on line access the flexibility of an easy-to-complete mail-back format. Surveys are distributed to customers via direct\_mail marketing efforts, as handouts through In-Home visits and public events, and through customer requests. Participating customers are given a survey and materials explaining the value of the program. Once completed, the survey is mailed back to the statewide Mail-In Survey vendor for processing. Completed surveys are analyzed against the customer's actual energy usage, and a report representing actual energy usage in graph form is mailed to the customer. Reports include information on energy efficiency products and services, rebate programs, and other energy-related information to encourage adoption of energy efficiency measures identified through the energy survey. During 2004-2005, each IOU will add Mail-In Surveys in two additional Asian languages to increase program participation within this community.

3) Hard-to-reach customers with limited or no on-line access:

The In-Home Survey provides customers, particularly HTR customers who may not respond to On-Line and Mail-In Survey options, with a more personalized, face-to-face energy survey alternative. This program component is currently available to residential customers residing in SCE and SDG&E service areas.

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### B. Customer Eligibility

The HEES Program On-Line and Mail-In Survey components are available to residential customers residing in PG&E, SCE, SoCalGas, or SDG&E service areas. The In-Home Survey component is available in SCE and SDG&E service areas, and in limited areas in PG&E's service area.

### C. Customer Complaint Resolution

#### **Southern California Edison Specific:**

SCE believes that one of the key elements to make the program successful is to be responsive to customer questions, complaints, and to resolve program or performance disputes with program participants. Customer satisfaction has been a priority of the HEES program as evidenced by a high percentage of customers being satisfied with various aspects of the program. SCE will continue to deliver this program that builds on the success of the growing infrastructure put in place. The following resources were allocated to resolve any customer inquiries and complaints:

Mail-In Survey – Direct-mail survey vendor maintains a toll-free telephone line to assist customers with any survey questions. Telephone representatives are trained to discuss survey results with customers, provide support for and conduct surveys in Spanish and Chinese, respond to requests for a second survey, and, when necessary, provide referrals to other programs.

On-Line Survey – A “Contact Us” button is located on the upper right corner of the screen in the On-Line Survey. By clicking this button, customer can contact On-Line Survey vendor by e-mail with any survey or energy efficiency questions.

In-Home and Phone Surveys – In-Home Survey vendor maintains a toll-free telephone line to schedule In-Home or Phone Survey with customers. Bi-lingual energy auditors are trained to discuss survey results with customers, conduct surveys, and when necessary, provide referrals to other programs.

Energy Efficiency Call Center – Customers can also call SCE's toll free Call Center to talk to a telephone representative on any energy efficiency related questions in multiple languages.

All customers' complaints, and any customer questions that cannot be answered by the survey contractors or the Energy Efficiency Call Center, are referred to the SCE Program Manager. The Program Manager contacts each customer to answer questions or resolve disputes. Unresolved disputes are escalated to the Manager of Residential Programs for resolution. It is rare that the customer cannot be satisfied at this level. From here, the customer is provided the option of filing a complaint with the CPUC, to which SCE responds at a later date.

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### D. Geographic Area

#### Southern California Edison Specific:

SCE's service territory ranges approximately from north of San Diego and most of Orange County in the south, Riverside and San Bernardino Counties in the east, and through central California in the north. There are several municipalities in this area not covered by SCE: much of Los Angeles County serviced by Los Angeles Department of Water and Power, Anaheim, Riverside, Pasadena, Azusa, and other municipalities.

## IV. Measure and Activity Descriptions

### A. Energy Savings Assumptions

~~Section IV.A is not applicable. Based upon the California Public Utilities Commission's (CPUC) approved Energy Efficiency Policy Manual, an information only program is not reasonably expected to provide an estimate of energy savings. The lack of energy savings, capacity savings, therm savings, resource benefits, or a TRC ratio for any particular program, i.e., information programs, should not imply that a measure or program does not promote energy efficiency. Neither should it imply that there is no impact to the customer's use of electricity or natural gas, nor a corresponding impact to the electricity or natural gas system. The expected net energy savings for 2004 based upon these assumptions would be approximately 5,683,000 annual kWh.~~

#### Southern California Edison Specific for each of the two years in 2004 and 2005<sup>5</sup>:

<u>Survey Type</u>	<u>Number</u>	<u>Net kW</u>	<u>Net Annual kWh</u>
<u>Mail-In</u>	<u>18,000</u>	<u>1,062 kW</u>	<u>2,221,200 kWh</u>
<u>On-Line</u>	<u>12,000</u>	<u>708 kW</u>	<u>1,480,800 kWh</u>
<u>In-Home</u>	<u>4,500</u>	<u>427.5 kW</u>	<u>1,981,800 kWh</u>
<u>Total</u>	<u>34,500</u>	<u>2,197 kW</u>	<u>5,683,800 kWh</u>

Although the HEES program is an information program, the potential program energy savings resulting from the actions customers take after receiving an energy survey has been based on the Evaluation of Southern California Edison's 2001 Residential Audit Programs: Final Report, Ridge & Associates, September 6, 2002.

### B. Deviations in Standard Cost-effectiveness Values

<sup>5</sup> The savings are per household from the 2002 Ridge Associates study and are based on the estimates generated in two impact evaluation reports using billing analysis, which means adoption rate is already taken into account in the per household estimates. For methodology, see "Evaluation of SCE's Mail-in Audit Program (Study 528 B)", by RER 1997 and "Evaluation of SCE's In-Home Energy Audit Program (Study 528 A)", by RER 1996

# **Southern California Edison**

## **2004-05 Energy Efficiency Program Plan**

Section IV.B is not applicable.

### **C. Rebate Amounts**

Section IV.C is not applicable.

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### D. Activities Descriptions

#### Southern California Edison Specific:

Mail-In Survey - The Mail-In Survey is distributed to customers via direct mail, CBOs, community events and customer requests. Total implementation cost for this activity is estimated at \$660,000 per year.

On-Line Survey - The On-Line Survey allows customers to obtain immediate results by answering specific questions regarding their home energy use on-line via Internet and is also available via IOU's website. Total implementation cost of this activity is estimated at \$180,000 per year.

In-Home Survey - The In-Home Survey program will provide customers an on-site energy survey by a trained energy auditor. The auditor provides a customer with saving recommendations and an information package that includes an Energy Guide printed in the customer's spoken language of choice. Total implementation cost for this activity is estimated at \$295,000 per year.

Phone Survey – The Phone Survey is an alternative to the In-Home survey that allows customer to obtain immediate results from a trained auditor who walks the customer through the survey over the phone. Total implementation cost for this activity is estimated at \$30,000 per year.

Community-based and Faith-based Organizations – IOUs will explore opportunities to use CBOs and FBOs as new delivery mechanisms to promote the In-Home Survey and Assist customers in completing the Mail-In and On-Line Surveys. Total implementation costs of this activity is estimated at \$240,000 per year.

### V. Goals

#### 2004 and 2005 Program goals

Utility	Number of Completed Mail-In Surveys	Number of Completed On-Line Surveys	Number of Completed In-Home and Phone Surveys	Total Number of Completed Surveys	Number of HTR Customers / Mail-In Survey Mailings*
SCE	18,000	12,000	4,500	34,500	50 percent

\* N/A for On-Line survey

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### **VI. Program Evaluation, Measurement and Verification (EM&V)**

#### **A. General Approach to Evaluating Program Success**

This EM&V plan will meet the objectives of the Commission as outlined in the Energy Efficiency Policy Manual by evaluating the success of the Statewide Home Energy Efficiency Survey (HEES) Program through multiple EM&V activities. This is an information program that needs to be assessed using a combination of approaches evaluating the impact of various elements of the program.

Accordingly, this evaluation study entails an assessment of the Mail-in, In-Home and On-line components of the program by obtaining the necessary customer information needed to evaluate the effectiveness of these surveys. The information obtained in this evaluation can then be used in conjunction with information gathered from previous evaluations of the HEES Program to provide an assessment of the different options for offering energy efficiency surveys and their impact on varied customer groups. Using such an approach, this EM&V approach will also be able to provide quantifiable results that will support potential energy impacts from this program, such as quantifying net-to-gross inputs, energy efficiency measure implementation rates, and specific information to inform affect of this information program on adoption rates for other residential programs.

#### **B. Approach to Measurement and Verification of Energy and Peak Demand Savings**

Since this is an information program, the Measurement and Verification approach for Energy and Peak Demand Savings is not required according to guidelines provided by the Policy Manual. The program accomplishments will be measured in the form of number of surveys completed in the IOUs service territories and will be verified by an independent EM&V consultant. In addition, data will be gathered and analyzed for potential energy impacts of the program based on a methodology recommended by previous evaluation study for this program.

#### **C. Approach to Evaluation of Program Success**

Other important aspect of evaluating this program that addresses the EM&V objectives of the Commission are as follows:

Market Assessment and Customer Behavior Analyses – These activities assist with assessing customer awareness, behaviors and practices given their participation in the program. A survey will be conducted of the general customer population, which may include previous program participants and non-participants, in order to continue assessing awareness and barriers to participation for the HEES program by customers of the IOUs service territories. The market assessment will involve use of statewide and utility-specific data to assess the program's impact on customer awareness and knowledge of energy efficiency opportunities in customer homes.



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Process Evaluations – Survey of program participants and nonparticipants conducted as part of the market assessment activities will also help in determining effective means to improve program design, and targeting and tracking of customer participation, including underserved populations.

### **D. Potential EM&V Contractors**

The contractors listed below can objectively and effectively evaluate program success. As a group, their work includes impact evaluation, measurement and verification, process evaluation, market assessments, and verification of program accomplishments. These firms have a track record of completing high quality, objective studies of energy efficiency programs either for the California IOUs or for other entities whose studies we have been able to review. This list does not include all of the qualified evaluators who could objectively evaluate program success.

ADM Associates	Megdal & Associates
Aspen Systems Corp.	Opinion Dynamics
Energy Market Innovations	Quantec LLC
Equipoise Consulting	Quantum Consulting
Frontier Associates	Ridge and Associates
Global Energy Partners	PA Consulting Group
ICF Consulting	Research Into Action
Itron (RER)	TecMKT Works
XENERGY	Vanward Consulting
KVDR Consulting	Wirtshafter Associates

## **VII. Qualifications**

### **A. Primary Implementer**

SCE has provided residential customers with energy efficiency programs at the direction of the California Public Utilities Commission (Commission) since the early 1990s. Early programs provided information to residential customers on energy efficient appliances, home insulation, heating and air conditioning while providing commercial customers detailed, on-site energy analysis (surveys). Programs and services for both markets evolved into information programs coupled with equipment rebate programs.

Surveys of customers indicate that SCE has remained the most trusted source for unbiased energy efficiency information, services and programs. Customers continue to look to SCE for assistance in managing their energy use and costs.

Teams of SCE engineers, marketing professionals and customer service specialists have demonstrated significant competencies in a variety of essential areas of

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program design and deployment, reporting/accountability program measurement, assessment and evaluation.

SCE has been helping residential customers control their energy costs for over 20 years and will use its knowledge, experience and external relationships to provide maximum value through the program. The program's foundation relationships are established with the federal government's ENERGY STAR<sup>®</sup> program, the statewide Flex Your Power Campaign and California's other large private and public utility companies. The IOUs have offered the HEES program for more than 10 years, each year increasing customer participation, outreach and achievement for long-term energy savings.

### Program Design

Responsive, and timely action characterizes the SCE team approach to program design. Commission priorities, changing markets, technologies, and priorities of interested stakeholders require the flexibility to respond to the wide variety of needs within the annual program cycles. SCE's design team has demonstrated its ability to move rapidly and effectively, from the resource acquisition emphasis of the pre-1998 programs to the market transformation focus of the California Board for Energy Efficiency. SCE's program design team also met the challenge of rapidly responding to the 2000 energy crisis by designing programs that not only saved energy, but also encouraged customers to change behavior and business practices.

### Program Deployment

A solid program infrastructure combined with the participation of key market actors and experienced service providers have ensured SCE success in program deployment for the last three decades. Successes are evident year after year by the accomplishment of the goals and milestones set in place through Commission and SCE agreements. SCE's staff has nurtured relations with the entire spectrum of parties whose joint efforts are necessary both to capture the interest and enthusiasm needed for a new program and to responsibly remove barriers to deployment.

### Reporting/Accountability

Responding to the more rigorous reporting and accountability requirements from the Commission over the last ten years, SCE has developed increasingly sophisticated procedures and competencies to meet the new levels of precision required in these areas. SCE has been able to provide thorough, reliable reporting as the needs and goals of the Commission have changed from the simple semi-annual and annual reports of the 1980s, to the complex reporting and net benefit accountability over the 10 year time period required of the pre-1998 programs. SCE reports on programs using both the pre-1998 methodology and the subsequent reporting requirements for monthly, quarterly and annual reports as well as

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responding to data requests from the Energy Division, administrative law judges of various proceedings and interested parties in proceedings.

### Measurement, Assessment and Evaluation

SCE's current measurement, assessment and evaluation (MA&E) capabilities are especially suited to meet the requirements of the Commission's present directives. The MA&E team members have worked closely with regulatory agencies and other IOUs, as well as other interested stakeholders, in establishing and coordinating the California Measurement Advisory Council (CALMAC) and the earlier California Demand Side Management Measurement Advisory Council (CADMAC). The MA&E team has participated and/or led many statewide measurement, assessment and evaluation studies as well as studies focused on local programs and issues.

SCE's Energy Efficiency staff has the strength and commitment to provide the Commission with successful programs responsive to both the goals of the Commission and the needs of customers.

### **B. Subcontractors**

#### Statewide Mail-In and On-Line Survey vendor:

Xenergy, Inc. has been the statewide Mail-In Survey vendor since 2000. They are responsible for printing, mailing, and processing all the Mail-In Surveys in different languages. Xenergy is an energy services and consulting company with a 27-year history of providing advanced technical and information-based solutions for the energy marketplace.

Xenergy, Inc. has also been the SCE On-Line Survey vendor since 2002. They are responsible for hosting, managing, and maintaining all the Xenergy on line energy analysis tools in the SCE Website.

Xenergy, Inc.  
492 Ninth Street, Suite 220  
Oakland, CA 94607

#### In-Home and Phone Survey vendor:

Conservation Services Group (CSG) has been SCE's In-Home and Phone Survey vendor since 1993. Their bi-lingual staff are responsible for scheduling appointments and conducting field or telephone surveys, and processing the completed surveys. CSG was established in 1984 with the specific purpose of designing and delivering energy efficiency services primarily in the residential market place. While based in Boston, MA, CSG has service delivery capabilities in New England, Wisconsin, Midwest and California,

Conservation Services Group  
16967 Main Street, Suite 108  
Hesperia, CA 92345

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The utility does not contract with any consultants and/or subcontractors for management of its HEES programs.

### **C. Description of Expertise**

#### **Jennifer Shen, Program Manager**

Jennifer Shen brings over 13 years of experience in contract and project management with LADWP and SCE. She managed procurement contracts for labor, material, consultant services, and energy efficiency programs ranging from \$25 to \$200 million. As program manager for SCE's statewide Home Energy Efficiency Survey program, Jennifer develops program plans, tracks program performance and budget, and represents SCE on the statewide working groups. Jennifer's extensive contract management experience is essential in establishing and maintaining contract compliance with program implementation. Throughout her career, Jennifer has led cross-functional teams to achieve corporate and CPUC goals and objectives. Her leadership skills are also effective with developing marketing strategies, specifically in the areas of targeting hard-to-reach customers and coordinating program activities with community-based organizations to increase consumer awareness about the benefits of energy efficiency.

#### **Cheryl Wynn, Manager, Residential Energy Efficiency Programs**

Cheryl Wynn has over 11 years of experience in designing and implementing energy efficiency programs and services for SCE. She has implemented financial incentive, education/information and market transformation programs for residential and small business customers. With a career that includes managing local, statewide, cross-cutting, and third-party programs to achieve public policy energy efficiency goals, Cheryl brings a unique blend of expertise in the residential market and strategic planning and execution necessary for this position. She has managed SCE's Statewide Appliance and Lighting Programs, Statewide Single Family Energy Efficiency Rebates, Statewide Home Energy Efficiency Surveys, Refrigerator Recycling, Local Residential In-Home Energy Surveys, Residential Energy Guides, Energy Efficiency Mobile Education Unit, Energy Efficiency Website and several Third-Party and Summer Initiatives. She also worked on national and statewide teams to support the DOE/EPA's Energy Star® program and statewide marketing and outreach campaigns. As manager of Residential Energy Efficiency Programs, Cheryl leads a staff of program managers and cross-functional teams to implement SCE's Statewide Single Family Energy Efficiency Rebates, Statewide Home Energy Efficiency Surveys, Local In-Home Energy Surveys and several Local Third-Party Contracts.

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## **VIII. Budget**

Program Budget	
<b>Total Program Budget</b>	<b>\$5,728,379</b>
Administrative	\$1,083,400
Marketing	\$1,222,200
Direct Implementation	\$3,294,400
EM&V	\$128,379
Other	